



Save The Date! Fall 2018 Program

Program Details

Monday, October 22, 2018 | 8:00 — 11:00 AM
More Details: PGNV.ORG or inquiries@pgnv.org

Program Topics

Top 10 Charitable Planning Strategies for Advisors Under the New Tax Law: Helping Your Clients & Your Business with Charitable Planning

This session gives the top approaches to helping your clients and growing your practice using charitable planning with special tips related to the new tax law. Participants will learn how to provide tremendous benefit to clients, while improving their own assets under management, with charitable planning. Topics include gifts from retirement plans, gifts of appreciated assets, the use of private foundations, and life insurance.

PLUS!

Inside the Mind of the Planned Giving Donor: What Neuroimaging & Experimental Research Reveal About Donor Motivations

Reporting results from his research at the Texas Tech Neuroimaging Institute, Dr. James reveals the latest insights into how donors engage in charitable bequest decision-making. These findings come together to reveal the deep processes of donor decision-making in planned giving. Not just an academic presentation, this session presents practical, effective, and tested approaches to encourage generosity among planned giving donors.

Program Speaker

Dr. Russell James

Russell James, J.D., Ph.D., CFP® is a professor in the Department of Personal Financial Planning at Texas Tech University. He directs the on-campus and online graduate program in Charitable Financial Planning. Additionally, he teaches Charitable Gift Planning at the Texas Tech University School of Law. He graduated, cum laude, from the University of Missouri School of Law where he was a member of the Missouri Law Review. While in law school he received the United Missouri Bank Award for Most Outstanding Work in Gift and Estate Taxation and Planning. He also holds a Ph.D. in consumer economics from the University of Missouri, where his dissertation was on charitable giving.

Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri for 6 years and later served as president of the college for more than 5 years, where he had direct and supervisory responsibility for all fundraising. During his presidency the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment.

Dr. James has over 150 publications in academic journals, conference proceedings, and books. He has been quoted on charitable and financial issues in a variety of news sources including *The New York Times*, *The Wall Street Journal*, *CNN*, *MSNBC*, *CNBC*, *ABC News*, *U.S. News & World Report*, *USA Today*, *the Associated Press*, *Bloomberg News* and *the Chronicle of Philanthropy* and his financial neuroimaging research was profiled in *The Wall Street Journal's Smart Money Magazine*.